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ABSTRACT

In little over a decade, England has given its 24,000 governing boards of public schools the power to hire their principals and virtually autonomous authority over their school budgets. England established, and then curtailed, a national voucher program. It made all its public schools "schools of choice." It created a new type of public school that received total autonomy from local school authorities and additional funding. However, the nation is now in the process of bringing those schools back into their school systems, while reducing additional funding. Simultaneously, they have initiated a very demanding accountability process that exceeds the typical standardized testing model common in the United States. The Labour party is launching sweeping changes in teacher preparation, proposing to initiate merit-pay incentives, and is creating "education enterprise zones" that will experiment with privatizing schools. A North Carolina delegation of educators, policymakers, and business leaders presents the findings of their look at England's experimentation with an educational choice laboratory and their first-hand observations of what comes from sweeping parental choice programs. (DFR)

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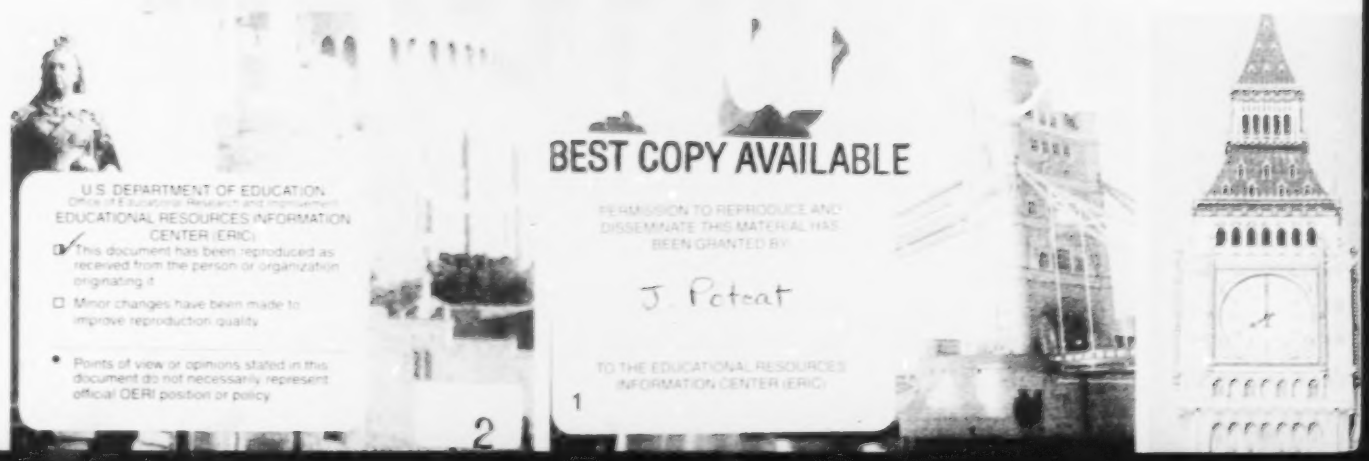
The CHOICES We Make

An Examination of the Impact of a Decade
of Parental Choice & School Accountability Experimentation in England



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The findings of a North Carolina delegation of educators, policymakers & business leaders May 1999

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Introduction

When a 29 person delegation of North Carolina business leaders, policymakers and educators left in March of 1999 to study schools in England they were under the mistaken impression that American colonists were the revolutionaries. When it comes to education however, England's school choice experimentation makes the United States seem timid by comparison. To label what has happened in English schools "a revolution" is to run the risk of understatement.

In little over a decade, England has given its 24,000 governing boards of public schools the power to hire their Head Teachers, or principals, and virtually

autonomous authority over their school budgets. England established, and then curtailed, a national voucher program. It made all of its public schools "schools of choice." The English created a new type of public school that received total autonomy from local school authorities and additional funding. However, they are now in the process of bringing those schools back into their school systems while reducing additional funding. At the same time, they have put into place a very demanding accountability process that goes far beyond the typical standardized testing model common in the United States.

All of these experiments have been started or stopped since 1988 and the pace of change has not abated. The Labour Party, restored to power in 1997, is launching sweeping changes in teacher preparation, proposing to initiate merit pay incentives and is in the process of creating "educational enterprise zones" that will experiment with privatizing schools.

Now that 34 states, including North Carolina, are in the early years of experimentation with parental choice options, England offers an educational choice laboratory that has been engaged in experimentation for over a decade. The opportunity to see first-hand what comes from sweeping parental choice programs motivated the study that led to the findings that follow.

A partnership that included the Public School Forum's Institute for Educational Policymakers, the North Carolina State Board of Education and the North Carolina Center for International Understanding (NCCIU), organized the trip with financial support from the Burroughs Wellcome Fund, the Kenan Family Trust and GlaxoWellcome. The delegation that went to England included members of the State Board of Education, the Board of Governors of the University of North Carolina, members of the State's House and Senate Education Committees, heads of major educational organizations, business representatives and others.

(l-r) Carr Agyapong, student guides Helen Marvin, Ann Whitmire, and Jo Ann Norris at Graveney Grant Maintained School, London

Readers Beware

Before documenting the findings of the delegation, it is only fair to issue two warnings. First, the old adage that "a little learning can be a dangerous thing" may apply to some of what follows. The delegation read considerable material before traveling to England; it was briefed in two orientation sessions by English officials and researchers who have studied England's schools. However, the time in England was brief, only a week in all. Further, the bulk of school visits took place in London and exposure to smaller communities and rural schools was limited to two days.

Predictably, as many questions were raised by this brief visit as were answered. The only consolation to that was offered by Harry Judge, former Dean of Oxford University's School of Education and one of the final presenters to the delegation. Judge, only half-jokingly, said, "If you're confused, you probably have it right! My fear was that you'd be convinced you understood what you've seen."

Second, the English experiment is not complete. As in America, the pace with which reforms have been put in place and abandoned is dizzying. Even as the delegation was visiting, the Labour Party was unveiling new plans and new directions for schools.

Thus, this report will not attempt to draw many conclusions about the final impact of England's experimentation. At best, the proverbial court is out. Some of what is underway appears promising. Some reforms that have been launched are already being abandoned, most notably a national voucher program.

It should be noted that there is little, if any, evidence that student performance is appreciably better or worse after this decade of experimentation. In fact, much of the last decade has focused on which adults would be empowered to govern the schools. Only in recent years does the spotlight appear to be moving squarely to the issue of student performance and the accompanying problems of low-performing schools.

As in many states across America, England's desire to reform schools is strong though the English appear willing to adopt far more extreme measures than those used in most states. The themes driving school reform are the same in both countries; however, the answer to genuine school reform appears to remain as elusive in England as it is in America.

Once again, the former Education Dean of Oxford may have captured it best when he said, "I want to welcome you to our educational laboratory. You may conclude it is run by mad scientists and that you have had the opportunity to see it before it explodes."

Only time will tell whether Judge's comment will turn out to be comic relief in an otherwise humorless search for better educational answers or prophetic in predicting that England's reform efforts will collapse as a result of attempting so much, so quickly.

Uncanny Parallels

Political Parallels

In the political arena, the parallels between the two countries are striking. Both nations have lived through a tumultuous period during which liberals and conservatives have struggled to gain and keep power, and the struggle continues.

- In both countries, charismatic leaders led what was termed a "Conservative Revolution" in the eighties. Margaret Thatcher in the United Kingdom and Ronald Reagan in the United States left a mark on policymaking that remains to this day.
- In both countries, political power shifted back into more liberal hands in the nineties. Ironically, it shifted to leaders claiming to represent "new" political thinking. Many parallels have been drawn between the "New Labour Party" of Prime Minister Tony Blair, and the "New Democratic Party" of President Bill Clinton.
- Both countries' new, more liberal leaders have adopted educational positions that would have been an anathema to their parties not too long ago. Blair, for instance, is a proponent for privatization of failing schools and for introducing financial incentives for teachers in high performing schools. Clinton, meanwhile, supports experimentation with charter schools and is calling for an end to social promotion.

School Reform Parallels

Parallels are as striking in education. Anyone immersed in North Carolina's drive for school improvement would feel at home in England.

- England's entry into school accountability began with national legislation enacted in 1988; North Carolina's began with legislation enacted in 1989.
- Both pieces of legislation resulted in the establishment of curriculum frameworks upon which standardized tests were created. In both places, building-by-building testing results are issued to the public; in England, they are school performance tables, commonly referred to as "league tables," a metaphor alluding to soccer league scores; in North Carolina, "ABCs Report Cards."
- Over time, accountability plans in both countries "raised the bar" and established more serious consequences for failing schools. In North Carolina, the state's lowest performing schools are assigned full-time, five-person assistance teams that have the power to recommend removal of school principals. In England, the government can dissolve failing schools or, under recent legislation, privatize the management of failing schools.
- In both countries, serious experimentation has begun with parental choice options. In England, all schools have become "schools of choice." In North Carolina, parents now choose from charter, magnet, and year-round schools as well as other options.
- Both countries are in the midst of empowering local communities and/or school buildings with more authority; however, the "trade off" in both places has been higher standards and accountability for more freedom from rules and regulations.
- Both places are focusing on ways to deal with racial and ethnic diversity and the performance gaps between different groups of young people. While the North Carolina delegation was in England, the national Education Department released a study accusing some schools of institutionalized racism. The study found alarming gaps between the scores of different ethnic groupings. At the top of the list are young people from China and India; far below are students from the Caribbean Islands and Bangladesh. Those studies mirror similar ones in the United States comparing performance outcomes of African American, Native American and Hispanic young people to scores of white students and other higher-performing ethnic groups such as the Japanese or Chinese. At the heart of these studies, however, are economic factors that both countries also have in common. Students from low income families, especially those who have recently immigrated to either country, are far more likely to fall behind in schooling than are English-speaking young people from more affluent families.
- Driving school reform in both nations has been an obsession with low standings in international testing comparisons and a concern that education will prove to be the Achilles Heel of economic competitiveness in the years ahead.

Striking Differences

The differences between schools in the two countries are as striking as the similarities. Returning to the diversity issue, English schools, especially those in the London Metro area which house one-third of England's population, are more like schools in Miami or Los Angeles than those in North Carolina. Not uncommonly, the London schools visited by North Carolina's delegation served students speaking 20 to 30 different languages. The way English schools collect student population data is testament to the degree to which the nation is awash with immigrants. One system visited by the delegation separated data into the following major categories:

- United Kingdom born white
- Other European white
- Gypsies
- Caribbean black
- African black
- Chinese
- Indian
- Other Asian
- Bangladesh

As to the schools themselves, one presenter cautioned North Carolinians to remember that the English system of public schooling was "grafted onto the nation's tradition of private schools." In fact, when all schools became schools of choice, many appeared to emulate the traditions of private schools by, for example, requiring uniforms and/or becoming exclusively schools for girls or for boys.

Since the forties, national school funding has been granted to church-controlled schools, the bulk of which are Church of England or Roman Catholic. Roughly 20% of students in England attend church-affiliated schools that are publicly funded. The churches retain a large amount of control over the schools, albeit they fall under the same national accountability system.

For parents and students, one of the most striking differences is the English system of admission to secondary schools. Students move from the primary to secondary grades based on a "meritocratic" system. As will be seen later, while in theory parents have broad choice among schools, it is more accurate to say that schools have broad powers in selecting parents and students based on academic achievement and other admissions requirements. The English system could not be more different than the attendance-boundary system used in most North Carolina schools.

On a national level, London, the nation's capital, is to local schools what state capitals are in the United States. While local education agencies (LEAs), broad jurisdictions resembling school systems in the U.S., once wielded considerable control over schools, that control has largely been appropriated by Parliament.

All public English schools fall under the same national curriculum and accountability programs. The national government is directly responsible for inspecting local schools and publishing its findings. The majority of school funding in England comes from the national government. Unlike the United States, it is a true national system of education with no intermediary branch of government, like our states, wielding significant authority over schools.

Last, when it comes to school reform efforts, the English have been far more willing to take a "go fast" approach than have most states in the United States. Reform initiatives in England have been rapid and sweeping. Some would suggest that this approach to educational reform is an outgrowth of England's governmental structure. The nature of the political structure is such that Parliament, unlike the U.S. Congress, has much broader powers and is less encumbered by the kinds of checks and balances that Americans take for granted. Additionally, in education, Parliament wields power over things that in the U.S. would be the exclusive domain of state governments. Thus, when it comes to school reform, if one can muster a majority of Parliament, it is possible to enact wide-ranging reforms overnight.

Rep. Doug Yongue with two students from the Ernest Bevin College (Boys), London

Overview of Parental Choice

The seeds for England's experimentation in parental choice were planted during the late seventies when Conservatives like Margaret Thatcher came into power and began embracing free market views of education. Thatcher, who in the seventies served as an Minister of State for Education, and other influential Conservatives, became advocates of the view that without competition there was little, if any, motivation for public schools to improve.

With that, sentiment in the political community shifted heavily against LEAs (local school system administrations) that were viewed as too rigid and bureaucratic to foster meaningful innovation. That sentiment resulted in the London LEA, the nation's largest, being subdivided into a number of smaller LEAs, or systems, in much the same way that New York and Chicago have experimented with breaking up their large school bureaucracies.

1988 Reform Legislation

By the time Thatcher became Prime Minister, the groundwork had been laid for what would become radical experimentation. In 1988, Parliament enacted school reform legislation that would rewrite the face of schooling in Great Britain.

- It required that every school be governed by a board of governors that included parents and educators elected at the school level, members of the local community and a minority of appointees selected by the LEA. The majority of the board was very much in the hands of parents and educators who were direct stakeholders at the school level.

• Building-level boards were given the power to appoint Head Teachers (i.e., school principals) and to determine budget priorities for their schools.
• To ensure that power resided at the building level, LEAs were directed to automatically pass along 90% of their budget resources to building-level boards of governors which were empowered to establish budgets for their schools.

By placing authority for budgeting and selection of Head Teachers in the hands of building-level governing boards, Parliament went far beyond the intent of North Carolina's "site-based management councils," required by law in each building. The site-based councils have control over only a small portion of the money it takes to run a school; the vast majority of budgetary control resides with school system administrators and elected school boards. Further, North Carolina's councils are, at best, only advisory when it comes to selection of building-level principals and other key issues.
• To ensure that the new legislation gave parents choice about the school their children would attend, the 1988 legislation also declared every school a school of choice. Parents were given the right to apply to any school they chose and, unless the schools were "over subscribed" (at enrollment limits) or unless applicants didn't meet school admissions standards, parents could send their children to the school of their choice. It was argued that parental choice would drive the marketplace; strong schools would flourish while weak schools would lose attendance and be forced to curtail programs or close their doors. The philosophy behind this legislation was the same as that advanced for charter schools.

'90s Laws Expand Choice

In the nineties, Parliament enacted three additional laws that expanded choice options even more dramatically.

Grant Maintained Schools

Grant Maintained (GM) Schools, like charter schools in the U.S., were essentially removed from any LEA supervision and granted even broader autonomy than were other schools.

It should be noted that GM Schools differ from North Carolina's charter schools in two ways. First, only existing public schools could become grant maintained; unlike North Carolina's charter school law, new start-up schools were not envisioned in the British legislation. Secondly, in contrast to North Carolina's charter schools, GM Schools were offered cash incentives. While charter schools operate without state support for facilities or maintenance, GM Schools were to receive all of the funding that public schools received, plus additional funds to reflect their additional responsibilities and generous capital grants.

City Technology Colleges

City Technology Colleges were also established by Parliament. They were envisioned as high schools that would be supported by both public funds and by businesses that would agree to be partners with the colleges. Like GM Schools, they were to be granted broad autonomy.

Government-funded Voucher Program

Finally, Parliament launched a government-funded voucher program called the Assisted Places Scheme. Touted as a program that would give lower income parents the same private school choices that upper income parents had, the Assisted Places Scheme was envisioned to offer government funding for young people choosing private schooling. The formula for providing assistance was "means tested," in that lower income parents would receive far more government assistance than would middle or upper income parents.

With the establishment of these three additional choice options, by the mid-nineties, England was in the midst of a sweeping parental choice plan far beyond the scope of any yet attempted in the United States. There was an almost dizzying array of choice options open to parents: publicly-supported religious schools, public schools governed by parent-dominated boards of governors, GM Schools that were almost entirely autonomous from LEA supervision, City Technology Colleges, and private schools with government voucher assistance.

The Trade Off

It should be noted that there also was, in political terms, a "trade off" for the new freedoms granted to schools. With the 1988 legislation came a national accountability plan, similar in some respects to North Carolina's ABCs accountability program. All schools that received public funding came under the accountability plan that was based on a national curriculum and a national test.

In addition, the government established an Office for Standards in Education (OFSTED) which, in turn, organizes an inspection process that would send teams into schools for a full week to assess the strength of the school. In North Carolina terms, England's accountability system combines mandatory statewide testing with an on-site inspection process similar to that which high schools must undergo to receive accreditation from the Southeastern Accreditation Association. The difference is that OFSTED inspections have resulted in poor schools being forced to close; Southern Accreditation, on the other hand, is routinely granted to schools, including some on the state's low-performing list.

This political trade off of freedom and choice for accountability is virtually identical to that made in states across the U.S. including North Carolina. As in the U.S., England would later come in for criticism from those who would contend that under the guise of granting freedom, government essentially assumed control over schools through the national curriculum and testing program.

In fact, as will be seen later, the delegation concluded that England's accountability system is driving change to a far greater degree than is parental choice. The political trade off of freedom and choice for higher standards and accountability may prove to have been the most significant factor in England's school reform experimentation.

What Transpired After a Decade of Experimentation?

By the mid-nineties, the English experiment had led to the kind of wide-ranging changes its architects had envisioned. By 1997:

- Over 1,000 of 24,000 plus schools had become GM Schools, operating largely outside of the authority of their local school system and receiving additional government funds.
- 38,000 of England's eight million students had enrolled in private schools through England's voucher program, the Assisted Places Scheme.

• All schools were schools of choice, governed by building-level boards of governors.
• Accountability became the order of the day. Standardized test scores were published annually and 6,000 schools per year were undergoing scrutiny by teams of inspectors.
• Competition for students between schools was intense as parents began to exercise choice options.

As with any change initiative, however, there were unintended as well as intended consequences. Among those least expected were:

• Good schools were indeed flourishing; however, with some exceptions they were not expanding their enrollment. Recognizing that small size was one of the appeals of sought-after schools, most sought-after schools of choice kept their enrollment low and, instead of expanding their student population, they had longer waiting lists of parents who could not gain admission for their children.
• Less sought-after schools were not closing their doors. Instead, they struggled on with fewer and fewer resources as their enrollments declined. While the national government had closed roughly 60 chronically low-performing schools, they soon reopened "under new management."
• Middle and upper income parents, not low income parents, were more likely to seek voucher support for private education. After five years, only 38,000 of eight million students had taken advantage of the Assisted Places Scheme and many of those were not needy.
• There was a marked decline in the number of candidates for teaching positions. At the university level, there was an even greater decline in numbers of students choosing to major in education.
• As England devolved responsibilities to the school house level, there was a steep increase in the number of non-educational staff required at the building level. Many schools, especially larger schools, had full time budget managers and grounds maintenance staff added to their faculties.

New Power; New Direction

In 1997 there was a much-predicted election reversal that returned the Labour Party to power. Labour's new leader, Tony Blair, drew comparisons to Bill Clinton. Both were relatively young and charismatic national leaders. Both campaigned as candidates of the "New Labour" or "New Democratic" Parties. Both took positions that were much further to the center or, in some cases, to the right of their party predecessors.

Blair and the Labour Party, however, came into power committed to changing some of the school reforms that had been enacted under the Conservative Party. For instance, they have:

• Eliminated the Assisted Places Scheme which is now being phased out. Students who had been granted vouchers will be funded until they complete their schooling; no new vouchers are being granted. In Labour's eyes, the voucher program had evolved into an educational subsidy program for middle and upper class parents – not, as envisioned, a popular choice option for low income families.
• Began phasing out the additional funds for GM Schools and are in the process of returning the those schools to a more subordinate role under LEAs. In the eyes of Labour, the additional funding for GM Schools simply created an inequitable funding system that weakened non-GM Schools.
• Called for LEAs to rationalize the patchwork quilt of school admission policies that has sprung up and are also returning more authority to the LEAs.

Thus far, these changes appear to have taken place with remarkably little political backlash; albeit, the only backlash recourse open to the public is at the ballot box. There seems to have been a general consensus that the voucher program wasn't meeting its intended purpose; the additional funding for GM Schools had sparked predictable animosity among other schools; and Labour's move to cut off incentive funds had been widely anticipated. Parents, confronted with a maze of conflicting school admission policies, appear to welcome the attempt to make admissions policies more uniform from one school to the other.

While Labour is making changes, it has adopted a pro-choice stance and appears to be leaving the broad framework of choice options largely intact. Labour also appears committed to the accountability program and has proposed steps to strengthen low-performing schools.

Lessons from England

What Can Be Learned from the English Experiment to Date?

Lesson 1

Be wary of unproven claims. The Labour Party's unraveling of some of the foundation blocks of the English choice experiment was an attempt to remedy some of the problems caused by policymakers embracing faulty premises and unproven claims. Chief among them was the theory that once parents were offered choices they would flock to excellence.

Contrary to that claim, there is little evidence that the majority of parents choose schools because of academic excellence. The overwhelming majority of parents appear to choose schools based on very practical, and possibly unsurprising, criteria such as:

- Proximity. The desire for neighborhood schools runs deep and the proximity of schools to homes continues to be a major factor in school choice.
- Social groupings. Children want to attend the schools where their friends are; thus, there is a strong pull to send young people to schools that attract their friends and playmates.
- Affiliations. In addition to social groupings, there is a strong likelihood that parents will choose schools that cater to people who share their affiliations – in England that is likely to be a church school that caters to people of the same faith.

Not surprisingly, parents most likely to screen schools based on student test scores and the strength of their academic programs tend to be parents who are determined to see their young people gain acceptance to the nation's best colleges. These parents, typically more educated and wealthier than the population as a whole, "shop" for the best choice option and appear to place educational excellence as their primary criteria.

For the majority of parents, however, school choice is an available, but largely unexercised, luxury. More precisely, as will be seen in the next lesson, it is also a luxury that is more theoretical than real.

Lesson 2

In a true school choice environment, schools may choose parents as much – or more – as parents choose schools. The free market cry that rallied support for England's choice experiment is the same that has rallied support for America's charter schools: "If parents had choice options, good schools would flourish and poor schools would be forced to close their doors."

In England, quite the opposite has occurred. Good schools tend to have long waiting lists and poor schools have suffered a slight decline in enrollment (and subsequently resources) but continue to limp along. In fact, in England, as in North Carolina, parents typically resist any efforts to close "their" schools.

The faulty premise that drove policymakers to embrace England's choice option was that good schools would dramatically expand their student enrollment as more parents chose to send their children to them. This rarely occurred. One of the highly-regarded high schools that was visited by the delegation enrolled 960 students – a number that researchers would say is almost an ideal size for a high school. While the government placed a subscription (enrollment) limit of 1,200 on the high school, it has maintained its enrollment level while its waiting lists have grown. This year's waiting list is over 500. When the Head Teacher (principal) was asked why the school didn't expand its rolls, he replied that the school's size was one of the features that distinguished it. "Why," he asked, "should the school become over-crowded and lose its appeal?"

Because England, unlike America, has not created charter-like schools that increase available classroom space, choice in England is a zero-sum game. More parents are competing for essentially the same spaces in effective schools. Thus, choice in England has largely evolved into a student choice program for popular schools.

To dramatize this point, an elementary Head Teacher took some of the North Carolina delegation into four classrooms of youngsters who were scheduled to move from the elementary to the secondary level in the next year. By a show of hands, the Head Teacher asked each class to respond to two questions: "How many schools have you applied to for admission to secondary school," and "How many of you have been accepted to date?"

(l-r) Sen. Howard Lee, Carr Agyapong, John Dornan, Rep. Pete Oldham, Grova Bridgers, and Mike Fedewa enjoying London weather.

In each class the response was essentially the same. Only a handful of students had applied to just one or two schools. The majority had applied to three or four schools. Some had applied to as many as seven or eight schools. When asked how many students had been accepted to date, roughly half the students in each class had gained admission; the other half was still waiting for notification.

Applying to a school is not as simple as it seems. There is not one test used to measure student's academic ability. Instead, most secondary schools administer their own tests and students applying at multiple schools must take multiple tests. Further, highly sought-after schools conduct interviews of applicants; those interviewed, however, are not necessarily the students but the parents. Not surprisingly, high-demand schools can, and do, "cream" the most desirable students who are supported by the most involved parents.

In the school that dramatized the complexity of England's admission policies, a full-time faculty member is assigned to the task of helping parents navigate the system. She counsels parents on how

to make application; she intervenes on behalf of individual students and she consoles students who are denied their first choices.

It should be noted that all students will gain admission to a school somewhere within the LEA. By law, LEAs must ensure that all students are assigned to a school. Those who have not gained admission to a high-demand school, however, are ensured only that they will gain admission to a less-in-demand school that is under-subscribed.

Thus, while England touts its system of choice, for the average parent, the choices are largely imagined, not necessarily real. In many respects the system is much like that of college admission in the U.S. where parents and students are free to apply to the college of their choice; however, colleges accept the students of their choice.

While the English admissions system runs counter to America's "open door" policies, it must be noted that this is but one example of cultural difference between our countries. In England, admission to college has long been dependent on how one scores on a national test. It is not, as in the United States, a situation where virtually any high school graduate can attend college somewhere, even with mediocre academic ability.

For decades, litigation in the U.S. has created a body of law around policies of equal access – be it ensuring minorities can attend any school or that handicapped children are guaranteed mainstreaming with other children or even using lottery systems to ensure that all children have an equal opportunity to attend a newly created charter school in North Carolina. In this respect, our countries differ a great deal.

Lesson 3

The offer of vouchers doesn't guarantee low income parents will flee failing public schools. The demise of England's Assisted Places Scheme, or voucher program, contains many lessons for North Carolinians. The voucher program was promoted largely on the basis that it would "even the social scales" by giving low income families the same private school choices that wealthier parents had available to them.

The English experience, however, does not substantiate that claim. After five years, only 38,000 of England's eight million plus students, or less than half of 1% of all students, had availed themselves of the voucher option. Contrary to the claims of voucher supporters, low income parents did not flock to use national vouchers.

In retrospect, that may have been a predictable outcome. If one refers back to the earlier lesson about parents and the factors causing them to choose schools for their young people, there are powerful reasons why parents did not choose to send their youngsters to schools that cater primarily to educated, affluent parents. For low income families, these are not schools that attract large numbers of people "like us." They almost certainly are not where their childrens' playmates and neighborhood friends are likely to go to school. In large measure, they are not schools close to the homes of low income families. And finally, they are not schools that attract people with whom low income families are usually affiliated, either by ethnicity or religion.

Moreover, the value of England's school vouchers did not come close to equaling the cost of tuition at many private schools, especially schools like Eton, one of England's oldest and most prestigious schools. Private schools that chose to participate in the Assisted Places Scheme had to agree to make up the difference between their actual cost of schooling and the value of the government voucher. For many private schools there was little, if any, incentive to participate.

Thus, the Labour Party's contention that the voucher program was largely an educational subsidy for affluent families appears to have been generally accepted by the voting public. When the North Carolina delegation visited, England was in the midst of abandoning the voucher program.

One private school administrator, an officer of England's National Association of Private Schools, who addressed the delegation admitted that private school officials were not surprised that the program had been abandoned. He even shared that private school enrollment grew slightly when the program was dropped – a fact he attributed to the number of people who had taken advantage of the voucher program and later opted to continue paying the private school tuition on their own when the program ended.

Lesson 4

Once Humpty Dumpty is broken it's hard to rebuild him. Governmental systems are fragile; when shattered, it is not easy to rebuild them. England's experience demonstrates that once radical changes are made to governmental systems, especially to the foundation, it is extremely difficult to turn back the clock and put the system back to how it was, even if that is desirable.

When England's choice experiment started, its first goal was to wrest power away from LEAs by giving funds directly to school building governing boards who were given the power to set and administer school building budgets. It also gave the boards the power to hire their Head Teachers (Principals). As the experiment evolved, schools were also empowered to cut one more link to LEAs by withholding the portion of their budget that would entitle them to a modicum of services from the LEA. A school that opted not to give the LEA that portion of their budget in essence became totally independent of the LEA.

These moves combined to dramatically reduce the role of centralized school administrations to the point that one of the inner city London LEAs visited by the delegation saw itself in a fight for survival. Its Executive Director, the equivalent of a School Superintendent in North Carolina, candidly admitted that if the LEA could not demonstrate its viability in the coming years there would be little possibility of it continuing.

It should be noted, however, that the North Carolina delegation was extremely limited by the brevity of its visit to England and by the limited number of schools and LEAs it was able to visit. In contrast to the self-described struggle for survival of an LEA in London, the delegation witnessed a very different picture in the Oxfordshire LEA.

Oxfordshire is a large LEA, composed of over 300 schools and 151,000 students – most of England's LEAs are much larger than are school systems in North Carolina. It encompasses the university city of Oxford and surrounding rural areas including the bucolic pastureland of the Cotswold district. In contrast to some of the much criticized LEAs in London, the Oxfordshire LEA traditionally was one of the leading English school districts. Unlike its counterparts in London, the Oxfordshire LEA appeared to have redefined its role through the last decade in such a way that it has carved out an important niche.

Testament to the Oxfordshire LEAs ability to maintain a central role through the last decade's reform era, is that only one of over 300 schools in the LEA opted to become a GM School, thus moving itself outside of the LEAs sphere of influence. Today, the Oxfordshire LEA is focused heavily on providing quality staff development, working with schools to identify improvement strategies and perfecting an intervention/support program with low-performing schools.

The LEA experiences observed by the delegation were so different that it is difficult to generalize on the role or future of LEAs. The one conclusion that is possible to draw, however, is that it is not easy for a national government to interface directly with local school buildings without an intervening governmental entity such as an LEA to provide on-site support and oversight.

Lesson 5

With a devolution of power comes additional, and labor-intensive, jobs. Following England's devolution of authority to schools, Head Teachers quickly learned that more than power had been transferred to school buildings – so had new jobs. Heading the list of new jobs was the responsibility of assuming budgetary responsibilities that previously had been the sole purview of LEAs.

One elementary Head Teacher summed it up when she said, "I am now a manager, not an instructional leader. Where I used to spend nearly 25% of my time

(l-r) Geraldine McNeill, Grova Bridgers, Maxine O'Kelley, and Vivian Turner entering Parliament for a meeting with English policymakers.

(l-r) Jane Norwood, Mike Fedewa, Judy White and Helen Marvin leaving Parliament.

(l-r) Rep. Pete Oldham, Phil Kirk, Joyce Elliott and Evelyn Monroe

working directly with young people, I now find myself needing more and more desk time to keep up with budgeting problems, maintenance issues and other things that I didn't used to worry about."

One school visited by the delegation vividly illustrated an unintended staffing result of devolution. The school, a large high school of 1,700 students, had a full time "bursar," or financial officer, with five people reporting to him. Where there formerly was a centralized payroll operation administered by the LEA, now individual schools have their own systems. Other centralized functions ranging from maintenance to transportation are now in the hands of individual school buildings. Some opt to purchase services from their LEAs; others choose to privatize functions they administer themselves.

Formerly, schools needing major repairs would petition the LEA for the necessary funding; now, schools need to finance repairs or renovations out of their existing funds and/or find creative long-term financing options to cover those costs or the cost of major purchases like school technology. This might partly explain why the school facilities visited by the delegation were typically a far cry from school facilities taken for granted in North Carolina. Buildings tended to be older and smaller and many were in need of upkeep, partly due to the high cost of upkeep of old or poorly built newer buildings and a long history of inadequate renovations by LEAs. Often this was exacerbated due to the rules which restricted the amount of capital local authorities could raise.

In business terms, it appears a large part of "economy of scale" was lost when budgeting power was completely devolved to local schools. Predictably, some buildings do far better in managing budgets than others. Some are large enough to hire full-time finance officers; smaller schools can band together and share one full-time finance officer; still other schools retain accountants to do payroll and handle school budgets.

In educational terms, devolution is transforming the job of Head Teacher. In the past, it was common for elementary Head Teachers to carry a formal, albeit light, teaching load and devote much of their time to instructional issues. Between managing budgets, dealing with building and grounds issues, and learning to work with building-level boards of governors, the job has become far more managerial and far less educational.

Lesson 6

New job pressures make jobs less appealing. Earlier in the report, it was noted that England, like America, is facing a growing shortage of teachers. The same phenomena is occurring at the Head Teacher level. In both cases, some attribute the decline in availability of educators to the new demands that devolution and accountability are placing on educators.

When the Head Teacher's job was largely designed for a master teacher, it was a natural job progression path for excellent teachers. Now that the job requires more and more managerial skills, it is less attractive to those who thrive on contact with young people, teachers and teaching.

The abrupt redefinition of the role of Head Teachers is leading England, like the United States, to redefine preparation requirements for school administrators. Already, the country is changing those requirements and intends to focus far more on preparing Head Teachers for the new roles that devolution has brought with it.

(l-r) Lynda McCulloch, Jim Johnson, John Dornan, Lucille Dalton and Sen. Walter Dalton in front of Parliament following a tea with members of Parliament and a visiting delegation of Elon College Teaching Fellows.

Examining Accountability

One of the many parallels between England and America is the timing of their entry into the school accountability arena. The reform legislation of 1988 led to the introduction of England's national curriculum and testing program; it was the School Improvement and Accountability Act of 1989 that thrust North Carolina into the same arena.

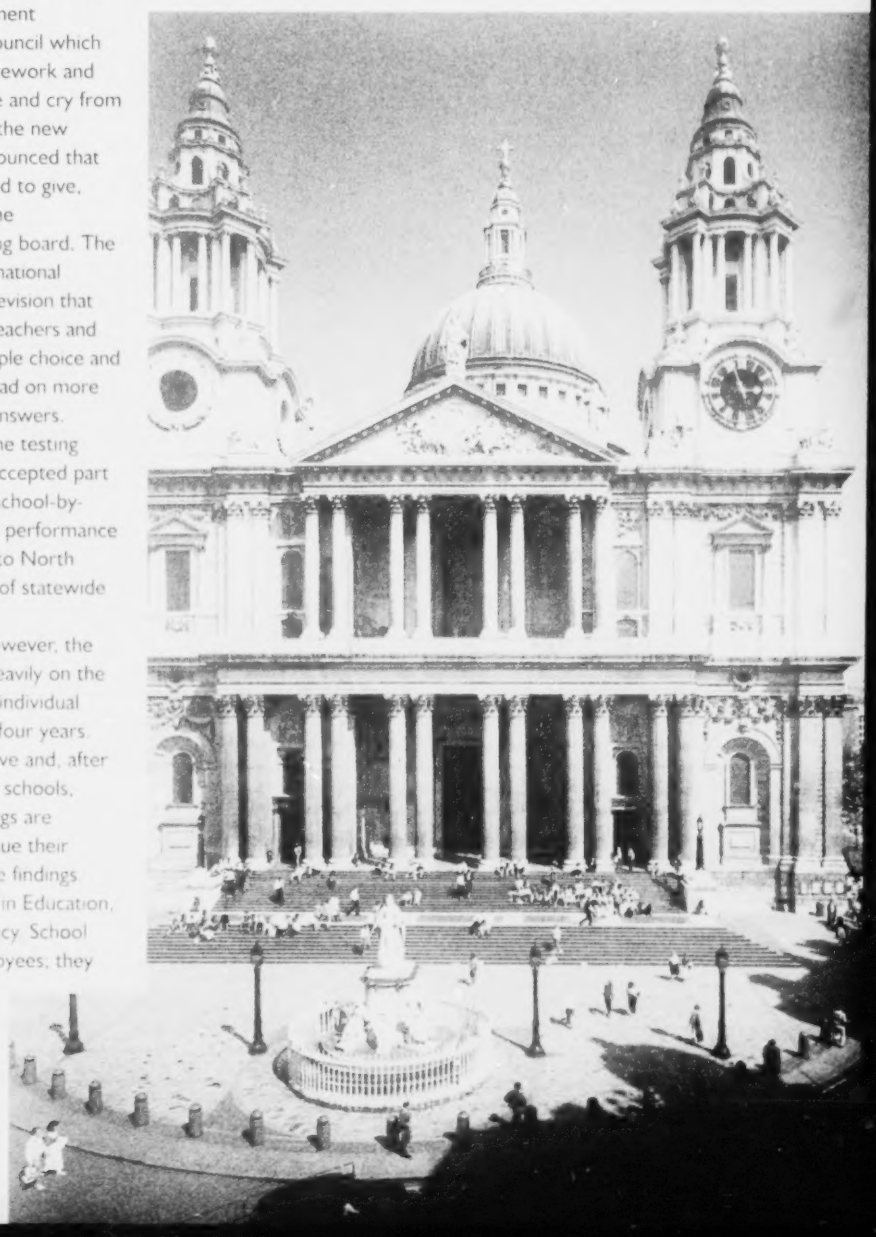
The introduction of accountability into English schools, however, was not a smooth one. With very little input from the educational community, England's national Education Department established a National Curriculum Council which developed a national curriculum framework and accompanying tests that caused a hue and cry from teachers and parents. Opposition to the new accountability standards was so pronounced that English teachers boycotted, or refused to give, national tests as scheduled, causing the government to go back to the drawing board. The result was a sweeping revision of the national testing and curriculum programs – a revision that was the result of a process involving teachers and others. The tests rely far less on multiple choice and true/false test items, and depend instead on more complex questions requiring written answers.

Since those changes were made, the testing program seems to have become an accepted part of the educational landscape. Today, school-by-school results are published in school performance tables, called "league tables," similar to North Carolina's annual ABCs Report Card of statewide testing results.

In addition to the national tests, however, the English accountability system relies heavily on the findings of a week-long inspection of individual schools conducted on average every four years. School Inspectors work in teams of five and, after an intensive examination of individual schools, publish their findings. Once the findings are published schools have to formally issue their improvement plans in response to the findings.

OFSTED, the Office for Standards in Education, operates as a quasi-independent agency. School Inspectors are not government employees; they are private contractors who are employed and trained by OFSTED. OFSTED is also not responsible for providing follow-up services to schools. Its sole role is school inspection.

When talking to Head Teachers, faculty members, parents who serve on Governing Boards and other school officials, it was clear to the delegation that School Inspectors have gained the attention of schools, to put it mildly.



The only thing in North Carolina that begins to compare to this inspection process would be the on-site assessments conducted by the Southeastern Accreditation Association of high schools wanting accreditation status. A major difference, however, is that English Inspection Teams can, and do, recommend drastic action, including closure, for schools that are failing to show signs of improvement. Also, the English Inspection Teams are focused on demonstrable evidence of serious school improvement where Southern Accreditation teams tend more to focus on the availability of resources and other issues.

While the very mention of School Inspection evoked strong reactions, there was an underlying, albeit begrudging, recognition that the process forced schools to be more focused and to remain mindful of continuous improvement. The inspection process appears to be the primary factor driving school improvement in England. When talking to educators and parents about accountability, it was the on-site inspection process, not standardized national test scores, that appear to drive their system. Unlike most accountability plans in America, the English inspection system focuses on whole-school improvement efforts, not simply the results of state mandated tests.

Parallels & Differences

Both Systems have Evolved Over a Decade

In both England and North Carolina, there have been numerous changes in testing programs and accountability standards. In both places, consequences have been made more rigorous, with North Carolina placing full-time assistance teams into low-performing schools and England having closed roughly 60 low-performing school and now creating "education action zones" that will experiment with school privatization.

In similar fashion, both accountability plans were launched with few, if any, incentives to reward high performance. While both offered more local control, England's accountability plans provided no rewards to educators. In 1997, North Carolina created financial rewards for faculties in buildings that met or exceeded their student performance goals. Similar rewards are now under discussion in England; however, teacher unions are threatening strike action if merit pay plans are implemented. The outcome is uncertain.

In Both Places, the Focus is Now on Low-performing Schools

Both England and North Carolina are discovering that "holding schools accountable" is the easy part of accountability. Finding ways to deal with the challenges of chronically low-performing young people is another task altogether.

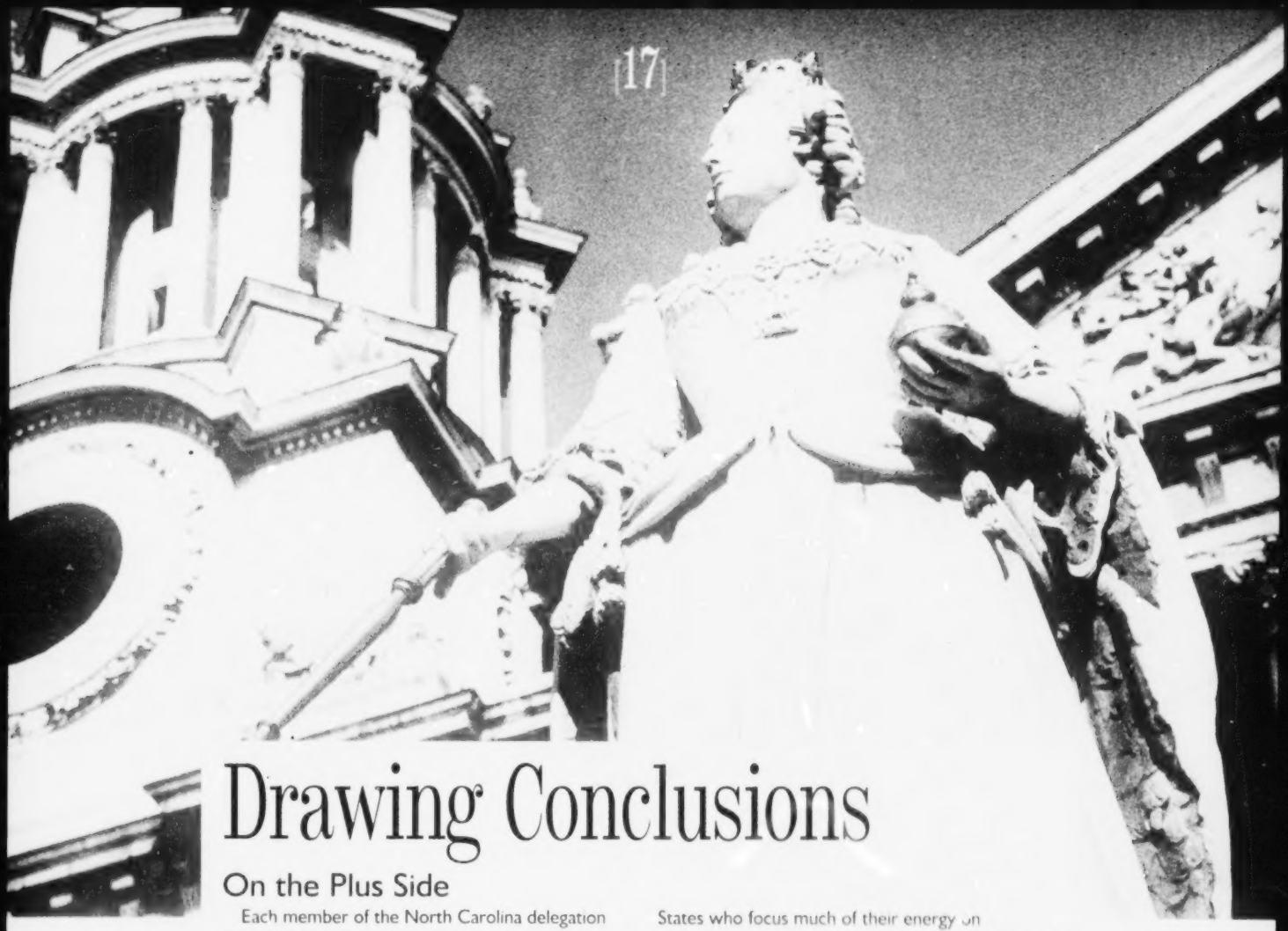
As noted earlier, one of the unintended consequences of accountability programs in both nations is testing data finding enormous performance gaps between racial and ethnic groups – performance gaps that are often traceable to income gaps between parents of low- and high-performing students.

In both nations, new strategies are being employed to focus resources on schools serving large numbers of low-performing students. In England, LEAs are being charged with devising early intervention and assistance programs for low-performing schools. In North Carolina, the state is using a variety of strategies ranging from assistance teams, to training programs to additional resources.

Both are Searching for the Right Balance of Consequences and Support

As in states across the country, England and North Carolina appear to be searching for the appropriate balance between dire consequences for low-performing schools and a resource and support base that gives low-performing schools a better chance of succeeding.

As with its other reforms, England is poised to take a more radical step than those under consideration in North Carolina. Its previously mentioned education action zones will make it possible to privatize low-performing schools by giving the day-to-day management of the schools to not-for-profit and for-profit firms willing to assume accountability for them. In contrast, North Carolina has just launched NC Helps, a program focusing resources on low-performing schools that devise promising improvement initiatives.



Drawing Conclusions

On the Plus Side

Each member of the North Carolina delegation was asked to isolate those aspects of the British system that had most favorably impressed them. Following are the items cited most frequently.

Parents Appear to be More Satisfied Under Today's Policies

Even if the English choice system gives parents a limited range of choice, parents express approval of the system. It may be, however, that their satisfaction has less to do with their choices than with the degree to which they genuinely are empowered over their local schools (see next point).

Parents Appear to have Embraced Building-level Control

Parents in England are wrestling with those issues that truly determine what a school will be like. They are members of governing boards that choose the Head Teacher, decide what expenditures will be made, how much of the school budget will go to salaries, and what class sizes will be. In contrast to parents in the United States who focus much of their energy on fundraising campaigns for local buildings, parents in England are wrestling with real problems and seeking real solutions. Thus, the parents appear to have a much higher degree of ownership and involvement with their schools than is true in North Carolina. It is important to note that "involved" parents in England (i.e., those serving on boards of governors) are much more involved than parents in North Carolina; in both places, however, there is a concern over how to involve more parents in the educational process.

National Curriculum Standards and the Accountability Program have Created a Unified, National System

Unlike the patchwork quilt of curriculum and testing standards in the U.S., England has a true national system of education. Educators and the public appear to support the system. Fair comparisons between schools from one end of the nation to the other are possible.

The English Inspection System is More Three-dimensional than U.S. Single-test Programs

Because of the week-long English Inspection process, schools are forced to focus on whole-school improvement, not just the results of a single, standardized test. While the five-day inspection process causes a high degree of anxiety within schools, there appeared to be a general consensus that the process kept schools focused on improvement and was of value.

England Seems to have a Far More Effective System of Teacher Induction

One aspect of English schools that struck a very responsive chord with members of the delegation who were classroom teachers was England's treatment of new teachers. In contrast to new teachers in North Carolina, new teachers in England have a reduced class load and work directly under the supervision of a veteran teacher during their first year of teaching.

There are Multiple Career Paths for Teachers

With the focus on new teachers, England provides differentiated teaching roles for teachers as they progress through their careers. Thus, as teachers gain experience and expertise, they can opt to become the equivalent of a lead teacher in North Carolina giving them career path options far different than those in America where teachers typically must choose school administration as the singular path of upward mobility.

Schools have "Defined Their Character" and are More Customer Driven

When all schools in England were made schools of choice it was immediately necessary for them to "define themselves," to carve out an educational niche that would be their marketing strategy for attracting parents and students.

It was clear that this process had resulted in schools clarifying their vision and, in some cases, reinventing themselves. Some schools emulated exclusive private schools and became all boys' or all girls' schools. Many now require uniforms. Others announced themselves as "back to the basics" schools; still others have a primary focus on science and technology or on the arts.

In North Carolina terms, it would be as if all schools in a system were suddenly to become magnet schools and had to create an educational philosophy and approach that would bring educational customers to their doors. The delegation felt that this process of schools defining themselves had resulted in a much sharper focus and, in some cases, distinctive and promising approaches.

With that, educators, especially Head Teachers, are very attuned to their parents and board of governors. With hire/fire authority at the building level, that is a predictable outcome; nonetheless, it may account for the strong approval ratings parents give the new system.

English Schools Appear to be Well Connected to Other Public Services

Under the English form of government, LEAs are part of a larger governmental sub-division that

would closely resemble county government in North Carolina. The responsibility for administering schools falls to a group similar to a county commission that is also responsible for public programs in welfare, health, housing and other areas. Subsequently, there appeared to be closer ties between public services and the schools. Schools, as an example, routinely are assigned nurses from their area's public health administration as opposed to providing them out of educational budgets.

On the Side of Caution

Be Wary of Unsubstantiated Claims

Driving much of the parental choice discussion in England and the U.S. are "free market" theory claims that are largely untested in a public school context. England's short-lived experiment with school vouchers and findings about the likelihood of low-income parents exercising choice are valuable lessons for the United States.

Parental Choice Only Comes with an Availability of Good Options

Parental choice is only real if there are good choices for parents to make. English presenters to the delegation were quick to point out that parents in rural areas of England have few, if any, choices open to them. The preponderance of choice is available to parents living in urban areas like London. Not only is an urban area more likely to have an infrastructure that will foster school choices, it has a transportation system that enables young people to take advantage of choices out of their neighborhood. Additionally, the English

Delegates meeting with English faculty and board of governors' members. (l-r) Mike Ward, Jo Ann Norris, four English faculty and board of governors' members, Carr Agyapong, Rep. Doug Yongue, Jane Worsham and Mike Fedewa.

experience underscores that for real choice to be available, there must be an over supply of space in good schools; otherwise, too many parents and young people will be competing for too few spaces.

Lead or Be Lead

When criticism of public schools was building in the seventies and eighties, the educational community in England and in the United States did not respond by advancing improvement initiatives of their own. Subsequently, the pressure for more radical reforms has grown on both sides of the Atlantic. Indeed, one could argue that the school improvement agenda in both places continues to be largely written by elected policymakers, the business community, private think tanks and others outside of the school community. It was striking how infrequently the educational community's role in England's reform movement was discussed; however, much the same could be said about discussions of school reform in North Carolina.

Holding Schools Accountable is Easiest Part

In both North Carolina and England, school accountability has brought with it a host of unintended consequences. Disparities among school performance in wealthy and poor communities are but one example. Gaps between racial groups are another. Finding a balance between strong consequences and rewards for performance is a third. Establishing accountability systems may, in retrospect, have been the easier part of the improvement effort; stimulating improvement across-the-board is an altogether more complicated task that may consume both places for years to come.

Power can be Devolved but Jobs and Functions Remain

England's devolution of power to school buildings contains several important messages for the United States. Reducing the role of LEAs, or in America, of states and school systems, can shift power; however, it will also shift jobs that must be done. Whether devolution of power means local school buildings establishing a budgeting and payroll office or whether it means the national government hiring a small army of School Inspectors, governmental functions don't disappear because power is moved. The job remains to be done. It is only a matter of which level of government is performing the jobs.

The English experiment should trigger a healthy reassessment of the appropriate roles of government at all levels and force one to rethink the potential value of intermediary forms of government, be they local school boards or state government.

The Test of Reform is Student Progress, Not Adult Satisfaction

As noted in several ways throughout this document, much of what has transpired in England in the last decade has had to do with authority over schools and who controls them. While improved student performance has been the rationale for the experimentation, it has been as much an ideological struggle between those who believe "less government is the best government" and those who believe a strong governmental role is the best way to achieve progress. Given the degree to which schools are central to the lives of parents and young people and given the amount of governmental investment in schools, it is naive to hope that schools can be above politics; however, when schools become a nation's primary battle ground for clashing ideological points of view, the consequences can be dire. It appeared to the

delegation that the focal point of reforms in England is shifting to student performance but it was sobering to realize that for almost a decade the focus appeared to be on issues related to politics, power and ideology.

If Ignored, Diversity-related Issues can Plant Seeds for Social Discord

The ethnic and racial diversity that is so prevalent in the metropolitan London area is not dissimilar from that which will be the demographic face of the United States in the future. The diversity that is causing England to address educational gaps between ethnic and racial groups, however, is as much diversity of economic class as diversity of color or language.

England's schools, like North Carolina's, do best at educating children who come to school from homes in which parents are educated and financially capable of providing a sound home life and support for their children. They do worst with students from low income families, those who are not fluent in English or those not capable of "making the system work for them." The challenge for both countries is to effectively educate the children of the group that has been labeled "the underclass," the economically disadvantaged. The North Carolina delegation was impressed with how English schools have adapted to dealing with diversity; however, student performance scores starkly point out that a huge learning gap remains. What was seen may be a glimpse into our own future.

Two things stood out. First, the make-up of England's teaching population doesn't begin to reflect the diversity of the students attending England's schools. The same can be said for the make-up of the teaching population in the United States. Both countries need to aggressively recruit and build a core of teachers more closely resembling their student populations.

Second, schools serving large numbers of London's inner-city students from low income families are beginning to employ the same strategies that are being used in North Carolina's low-performing schools that are showing measurable gains in student performance. We heard about schools instituting before and after school programs; others are making Saturday instruction available for young people at risk of failure. Both countries need to find more ways to close the educational gap.

Unintended Consequences Come with Change

It is impossible to implement the kind of wide-ranging experimentation that is underway in both England and North Carolina without encountering unintended consequences. As noted earlier, many attribute the pressure cooker environment that the inspection process has created with contributing to a growing teacher shortage in England. Even more puzzling is the sharp drop in college students majoring in education. Officials are asking if this decline is partially a reaction to reform experimentation. It is a phenomenon worth watching in North Carolina.

With that, the new competition between schools for student enrollment coupled with the LEAs ceasing many of the functions they once performed has led to a dramatic lessening of collaboration and sharing among educators. Several Head Teachers, for instance, expressed regret that they rarely meet with their counterparts from other schools; in a competitive environment, sharing trade secrets is counter-intuitive. Teachers who formerly would meet with their peers rarely have those opportunities in England's new climate.

In North Carolina, the relation between educators in charter schools and those in traditional public schools is very analogous. In a number of communities, charters are viewed as competitors and there is virtually no interaction between charter and traditional school educators.

The delegation also heard from researchers at the Roehampton Institute, an English research and public policy organization, which contended that schools were "excluding," or expelling, low-performing students at a much higher rate now that student test results are being publicized. They further contended that those being expelled tended disproportionately to be students from low income and minority families.

These issues bear watching; they will require skillful juggling on the part of policymakers. The

challenge for both countries is finding the proper balance between rewards and consequences without creating a situation that drives teachers out of the field, or students out of school.

Leaving Us Undecided...

England's Policy of Letting 16-year-olds Choose Alternative Career or Educational Paths

In England, as in many other European or Asian Rim countries, students at roughly age 16 take two distinctly different paths. Those passing required national tests may go on to school for two years of intensive academic preparation for college. Those who do not pass the tests can retake them until successful; or, they can enroll in technical training schools or enter job apprenticeship programs.

The United States has not embraced formal occupational high schools or employed job apprenticeships on a broad scale for high school students. In that regard we are different from most European countries which have had formal apprenticeship programs for generations; we are also different from countries like Japan where, based on test scores, high school students can enroll in an academic high school readying them for college or in occupational high schools in a host of areas ranging from fishing to manufacturing.

The North Carolina delegation was mixed on this point. Some felt that the English approach offered young people the option to prepare for employment and to be in an environment in which they would be more motivated and likely to succeed. Others were not so sure but all agreed that this difference is thought-provoking and deserves closer examination.

England's Non-retention Policy

Schools in England do not retain students who are unable to perform at grade level. Instead, they are promoted with their age group though Head Teachers and others assured the delegation that they would be given individualized instruction aimed at bringing them up to their grade level. This policy obviously flies in the face of the growing number of states, including North Carolina, that have made an "end to social promotion" their motto. Once again, this was a point upon which the delegation returned undecided.

To some, it was another indication that the English reform had not made increased student performance for all its primary goal. They contended that the outcome of such a non-retention policy was simply to ensure that many young people would not make the grade at age 16 when tests would determine their educational future. Others weren't so sure and, given the new North Carolina testing policies that will be in effect in 2001, the subject is sure to be hotly debated in the years ahead.

An Experiment in Progress

The delegation to England learned much from its brief visit but there will be much more to learn from England in the years ahead as the impact of reform can be measured in student terms. One thing is certain: "once the genie is out of the bottle, you can't put it back again."

Those were the words of the Minister of State in the English Department for Education and Employment. Those words are perhaps a good way to conclude this report. The face of education in England has been changed for years, possibly decades, to come. What educational face will emerge in the future, however, is very uncertain.

If anything is certain it is that the responsibility shouldered by the men and women who occupy policymaking positions in both England and North Carolina is heavy indeed. Systems, especially systems of government, are fragile things. Once weakened, it can take generations to put something better in their place.

As policymakers in the United States feel impatient after over a decade of school reform, it is worth reflecting on the English experiment. After over a decade during which parental choice was touted as the answer to school reform, the spotlight is back on the hard work of school improvement. No longer are English policymakers viewing programs like school vouchers as a panacea to failing schools; instead, they are focusing on root causes like teacher preparation and school leadership.

It may be that none of us, be we in Raleigh, North Carolina, or London, England, is likely to discover a panacea in this drive for school improvement. More likely, it will be the result of thousands upon thousands of policymakers, parents, business leaders and educators working shoulder to shoulder on the hard and demanding job of school improvement.

Hats Off
to our English Hosts

This trip would not have been possible without the assistance of the British Council, a not-for-profit organization that interfaces with countries across the world on a broad range of issues ranging from health to education. Council officials in Washington D.C. and in London, England, who were responsive to the needs of the North Carolina delegation, traveled with us while we were in England and arranged a rich and diverse set of experiences during our stay.

We are also grateful to officials in England's national Education Department, officials with one of the British Teachers Union, representatives of private schools, researchers with the Roehampton Institute, officials, faculty and students in Lambeth, Wandsworth and Oxfordshire LEAs and others who presented to the delegation.

Last, but far from least, we are deeply grateful to the educators and parents who opened their school doors to us during our visit. We were greeted warmly and had insightful, candid, discussions about schools and schooling in England. To all of them we are grateful.

Thank you

The Burroughs Wellcome Fund, the Kenan Family Trust and the GlaxoWellcome Corporation's financial support made this undertaking possible. We hope the North Carolina delegation's findings will lead to better decision making about the direction of school improvement in North Carolina that will validate each of those groups helping to underwrite this examination of schools in England.

A special thanks also goes to NCAE for hosting a luncheon for the NC delegation and a group of teachers from England who were visiting North Carolina prior to the delegation's visit to England.

Thanks also go to our English guides and advisors including (l-r): Lena Milosevic, John Rolfe, Louise Kitching, Caroline Clifford-Knapp and Libby Plum.

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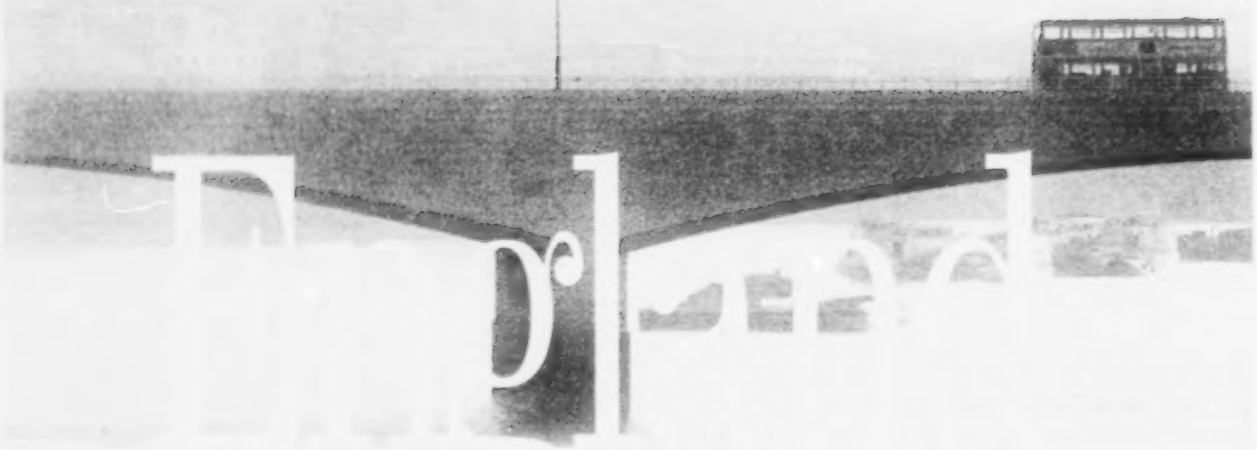

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